

-- UNOFFICIAL --

**Native American Business Enterprise Center (NABEC)
Competitive Panel Evaluation Form
Preliminary Review Checklist**

NEC Region:	
Funding Period:	January 1, 2008 - December 31, 2008
Geographic Service Area:	
Applicant Name (SF424 signature):	
Organization Name (If different than applicant name):	
Address:	
City, State, Zip	
Telephone:	

Preliminary Cost Information Section**Please do not enter any data in the gray shaded cells.**

	Year 1	Yr 1 - %	Year 2	Yr 2 - %	Year 3	Yr 3 - %	Total	Total %
Federal Share	\$0	#DIV/0!	\$0	#DIV/0!	\$0	#DIV/0!	\$0	#DIV/0!
Non-Federal Cost Share:								
Client Fees	\$0	#DIV/0!	\$0	#DIV/0!	\$0	#DIV/0!	\$0	#DIV/0!
Cash	\$0	#DIV/0!	\$0	#DIV/0!	\$0	#DIV/0!	\$0	#DIV/0!
In-Kind Share	\$0	#DIV/0!	\$0	#DIV/0!	\$0	#DIV/0!	\$0	#DIV/0!
Total Non-Federal Cost Share (10% Min.)	\$0	#DIV/0!	\$0	#DIV/0!	\$0	#DIV/0!	\$0	#DIV/0!
Total Project Cost	\$0	#DIV/0!	\$0	#DIV/0!	\$0	#DIV/0!	\$0	#DIV/0!

Disqualification/Rejection of Application

If either of the following is answered in the negative, the applicant shall be disqualified:

Please ck yes or no

	Yes	No
1. Signed application included - OMB Standard Form 424, "Application for Federal Assistance"?		
2. Application received by deadline?		
3. Application is to operate an MBEC?		
(a) Responsive and warrants further evaluation		

Administrative Review**Note: Please enter all points deducted as a positive number - it will be deducted appropriately**

	Points Deducted
1. Application (paper submission only) in triplicate - one original and two copies? (If no, deduct 1 point)	0.0
2. Table of contents provided? (If no, deduct 1/2 point)	0.0
3. Pages numbered consecutively? (Deduct 1/2 point for any or all missing parts)	0.0
4. Incomplete Program Narratives? (Deduct a total of 1 point for any or all missing parts)	0.0
5. Other Required Forms either missing or not signed as required? (Deduct 2 points)	0.0
Comment for deduction(s) For #5 above, please indicate missing or un signed document.	
Total Deductions	0.0

Summary of Panel Points Awarded	Max Points	Actual Points Awarded	Percent Points Awarded	
Section I. Applicant Capability	40	0.0	0%	Please do not enter any data in the gray shaded cells.
Section II. Resources	20	0.0	0%	
Section III. Techniques & Methodologies	20	0.0	0%	
Section IV. Proposed Budget/Costs	20	0.0	0%	
Sub-Total	100	0.0		
Section V. Non-Federal Cost Share Bonus	5	0.0		Oral Presentations are optional and held only when requested by MBDA (see FFO pg. 57)
Administrative Points Deducted		0.0		
Final Score before Oral Presentation	105	0.0		
Section VI. Oral Presentation	10	0.0		
Final Score after Oral Presentation	115	0.0		

Panelist Name: _____
Signature: _____

Date - Panel Forms: _____
Summary - Page: 1

PANELIST INSTRUCTIONS: -

The competitive review panel will score each NABEC application based upon the evaluation criteria. Points will be given for each evaluation criteria category not to exceed the maximum number of points allowed for each category. Scoring is restricted to the information contained in the application. Previous knowledge concerning the applicant organization or staff may not be taken into consideration at this point.

Scoring sheets have been designed to capture the requirements of the Federal Funding Opportunity Announcement. The rating scales have been designed to give panelists the option of assigning points. Each criterion is provided. However in general, here is a sample range of how points should be allocated:

a) Zero points if the criteria was not addressed

b) 0.5 to 1 point if *minimally* addressed. This means the applicant has recognized the criteria but has not provided detailed information.

c) 1 to 2 points for an *adequate response*. This means that the applicant has recognized the criteria and provided a response that contains some indication that he can satisfy the criteria.

d) 1.5 to 2.5 points for an *extended response*. This means that the applicant has provided a detailed discussion of the criteria and given evidence that the criteria will be fully met.

e) 2 to 5 points for an *outstanding response*. This means that the applicant fully understands the requirements as reflected in the discussion of how the criteria will be met. The applicant's response is substantive and examples are provided where appropriate.

f) Issue points in 0.5 or whole number increments

g) You will need to use the "View" - Header function to enter the Applicant's Name and Location, and the "Footer" function to enter your name as a panel member and date of paneling.

h) Start with entering the information highlighted on the 1st page of the Summary sheet.

i) In the required Federal and Non Federal Share in the Preliminary Cost Information Section, do not enter any data in the grey shaded areas.

j) Administrative Review - Enter the appropriate assigned points if applicable in a positive number. The point will be deducted appropriately.

k) Summary of Panel Points Awarded - Do not enter any data in this section (grey shaded). Data will be automatically transferred to this section once you rate and score the various criterion sections.

l) Please provide a comment on all questions that should correspond with your rating. In addition if you do not provide a score for a question, a comment is also required indicating "no information provided" or your reason for no score.

m) Please do not attempt to alter this form, as doing this may void the calculation formulas.

n) Comments are mandatory; please refer to the appropriate page number of application when commenting on a specific requirement.

End Summary "Preliminary Review Checklist"

Panelist Name:
Signature: _____

Date - Panel Forms: _____
Summary - Page: 2

-- UNOFFICIAL --**Native American Business Enterprise Center (NABEC)
Competitive Panel Evaluation Form****Section I. Applicant Capability****Maximum Points Allowable = 40****Total Points Awarded:****-****Percentage Awarded:****0%****Instructions**

For this criterion, the applicant must consider among other things, knowledge of economic region, i.e. Native American demographics, an assessment of the community's needs, prior experience in matchmaking, brokering, coaching and mentoring. A critical area of assessment is the applicant's client base and his ability to assess and evaluate clients.

The following information shall be evaluated:

- A. Native American Community - Knowledge/Previous experience in the Native American community, Native American Tribal entities and minority business sector.
(Maximum 4 Points)**

Points Awarded:**-****Panel Definition:**

Experience and knowledge of the Native American community, Native American tribal entities and minority business sector, and strategies for enhancing its growth and expansion; particular emphasis shall be on expanding SGI firms and tribal entities. Consideration will be given as to whether the applicant has a physical presence in the geographic service area at the time of its application.

- i) To what extent does the applicant provide a narrative discussion of its organization background with emphasis of its knowledge & previous experience in the minority community and minority business sector within the geographic service area? [2 points max]**

Rating Scale - points, if addressed:

Zero points if not addressed

0.5 pts at minimal level; 1.0 pts. at adequate level

1.5 pts. at extended level; 2.0 pts. at outstanding level

Points

Panelist Comments:

- ii) To what extent does the applicant demonstrate the experience and strategies for enhancing Native American community, Native American tribal entities and minority business sectors growth in the defined geographic service area? (1 point max.)**

Points

Rating Scale - points, if addressed:

Zero points if not addressed

0.5 pts at minimal level; 1.0 pts. at adequate level or better

Panelist Comments:

Panelist Name:

Initials: _____

iii) To what extent does the applicant demonstrate knowledge of expanding
SGI and/or rapid growth-potential Clients in the defined geographic service area?
(1 point max.)

Points

Rating Scale - points, if addressed: 0.5 pts at minimal level; 1.0 pts. at adequate level or better
Zero points if not addressed

Panelist Comments:**B. Business Consulting
(Maximum 5 points)****Points Awarded:****Panel Definition:**

Experience and knowledge of coaching and mentoring techniques related to serving SGI & rapid growth-potential minority firms.

i) To what extent does the applicant demonstrate experience in or knowledge of
of business consulting with respect to Native American, minority firms and
tribal entities, with emphasis on SGI firms in the geographic service area? (5 points max.)

Points

Rating Scale - points, if addressed: 1.0 pts at minimal level; 2.5 pts. at adequate level
Zero points if not addressed 3.5 pts. at extended level; 5.0 pts. at outstanding level

Panelist Comments:**C. Financing
(Maximum 5 points)****Points Awarded****Panel Definition**

Experience in and knowledge of the preparation and formulation of successful financial transactions.
Evaluate the applicant organization's professional working relationships within and outside
of the area with minorities and non-minority financial institutions. In addition, review any other public/private
sector involvement that the applicant organization and/or its proposed staff may have in obtaining financings

Panelist Name:
Initials: _____

that could assist them in operating the NABEC.

i. To what extent does the applicant demonstrate experience in matching Native Americans and other MBE's with sources of capital with an emphasis on the on the geographic service area? [1.0 point max]

Points

Rating Scale - points, if addressed: 0.5 pts at minimal level; 1.0 pts. at adequate level or better
Zero points if not addressed

Panelist Comments:

ii. To what extent does the applicant demonstrate experience in producing loan packages and/or bonds applicable to Native Americans and other MBEs? (3 points max.)

Points

Rating Scale - points, if addressed: 0.5 pts at minimal level; 1.0 pts. at adequate level
2.0 pts. at extended level; 3.0 pts. at outstanding level
Zero points if not addressed

Panelist Comments:

iii. To what extent does the applicant demonstrate experience in producing or assisting with equity/venture capital? (1 points max.)

Points

Rating Scale - points, if addressed: 0.5 pts at minimal level; 1.0 pts. at adequate level
Zero points if not addressed

Panelist Comments:

D. Procurement and Contracting
(Maximum 5 points)**Points Awarded****-****Panel Definition**

Discuss the applicant's experience in and knowledge of public and private sector contracting opportunities for Native American entities and other minority businesses, as well as demonstrated expertise in assisting clients into supply chains. (5 points max.) The applicant should provide key and/or support staff background in support of proposal claims. Staff experience should demonstrate the ability to facilitate and/or structure procurements, bids, etc. The applicant should provide information about its ability to work with large buying organizations and procurement/contracting officials.

i. To what extent does the applicant demonstrate experience in and knowledge of public and private sector contracting and/or opportunities? (1 point max.)

Points

-

Rating Scale - points, if addressed: 0.5 pts at minimal level; 1.0 pts. at adequate level

Zero points if not addressed**Panelist Comments:****ii. To what extent does the applicant have experience in facilitating contracts and procurements to Native American entities and other MBEs? (2 points max.)**

Points

-

Rating Scale - points, if addressed: 0.5 pts at minimal level; 1.0 pts. at adequate level

1.5 pts at extended level; 2.0 pts at outstanding level

Zero points if not addressed**Panelist Comments:****iii. To what extent does the applicant demonstrate experience in assisting Native American entities and other MBEs into supply chains? (1 point max.)**

Points

-

Rating Scale - points, if addressed: 0.5 pts at minimal level; 1.0 pts. at adequate level

Zero points if not addressed**Panelist Comments:**Panelist Name:
Initials: _____

- iv. To what extent does the applicant demonstrate an ability to assist
Native American entities and other MBEs in the areas of joint ventures and/or teaming? (1 point max) Points
- Rating Scale - points, if addressed: 0.5 pts at minimal level; 1.0 pts. at adequate level or better
Zero points if not addressed

Panelist Comments:

E. Financing Networks
(Maximum 5 points)

Points Awarded

-

Panel Definition

Assess the applicant's resources and professional relationships within the corporate, banking and investment community that may be beneficial to minority-owned firms.

- i. To what extent does the applicant's proposal reflect knowledge of the resources
and professional relationships within the corporate, banking and investment
community that can be beneficial to minority-owned firms? (2 points max.) Points
- Rating Scale - points, if addressed: 0.5 pts at minimal level; 1.0 pts. at adequate level or better
Zero points if not addressed 1.5 pts at extended level; 2.0 pts at outstanding level

Panelist Comments:

- ii. To what extent does the applicant demonstrate working relationships with
financial institutions capable to provide loans (alternative and/or standard) financings
to Native American entities and other MBE clients? (1 point max.) Points
- Rating Scale - points, if addressed: 0.5 pts at minimal level; 1.0 pts. at adequate level or better
Zero points if not addressed

Panelist Comments:

Panelist Name:
Initials: _____

iii. To what extent does the applicant demonstrate working relationships with financial institutions capable of providing bonds (alternative and/or standard) to Native American entities and other MBE clients in the construction industries? (1 point max.)

Points

-

Rating Scale - points, if addressed: 0.5 pts at minimal level; 1.0 pts. at adequate level or better
Zero points if not addressed

Panelist Comments:

iv. To what extent does the applicant demonstrate working relationships with financial entities capable of providing equity and/or venture capital to Native American firms and other MBE clients? (1 point max.)

Points

-

Rating Scale - points, if addressed: 0.5 pts at minimal level; 1.0 pts. at adequate level or better
Zero points if not addressed

**F. Establishment of a Self-Sustainable Service Model
(Maximum 3 points)**

Points Awarded

-

Panel Definition

Assess the applicant's summary plan to establish a self-sustainable model for continued services to the Native American community and other MBE clients beyond the MBDA funding cycle.

i. To what extent does the applicant describe a plan to establish self-sustaining model for continuing to serve the MBE community beyond receipt of MBDA funds? (2 point maximum)

Points

-

Rating Scale - points, if addressed: 0.5 pts at minimal level; 1.0 pts. at adequate level or better
Zero points if not addressed 1.5 pts at extended level; 2.0 pts at outstanding level

Panelist Comments:

Panelist Name:
Initials: _____

ii. To what extent is the applicant's concept for building a self-sustainable model feasible for execution in 3 years or sooner? (1 point maximum)

Points

-

Rating Scale - points, if addressed: 0.5 pts at minimal level; 1.0 pts. at adequate level or better
Zero points if not addressed

Panelist Comments:**G. MBE Advocacy
(Maximum 3 points)**

Points

-

Panel Definition

Discuss the applicant's experience and expertise in advocating on behalf of Native American communities, Native American tribal entities and minority businesses, both as to specific transactions in which a minority business seeks to engage and as to broad market advocacy for the benefit of the minority community at large.

i. To what extent does the applicant demonstrate prior activity that broadens market opportunities for all minority businesses? (2 point maximum)

Points

-

Rating Scale - points, if addressed: 0.5 pts at minimal level; 1.0 pts. at adequate level or better
Zero points if not addressed 1.5 pts at extended level; 2.0 pts at outstanding level

Panelist Comments:**ii. To what extent does the applicant demonstrate prior activity that yields specific transactions for Native Americans and minority businesses? (1 point maximum)**

Points

-

Rating Scale - points, if addressed: 0.5 pts at minimal level; 1.0 pts. at adequate level or better
Zero points if not addressed

Panelist Name:
Initials: _____

Panelist Comments:**H. Key Staff**
(Maximum 10 points)

Points

-

Panel Definition

Assess the applicant's qualifications, experience and proposed role of staff who will operate the NABEC. In particular, make an assessment that determines whether the proposed key staff possess the expertise in utilizing information systems and the ability to successfully deliver services as outlined in the work requirements. At a minimum the applicant must identify a proposed director.

i. Applicant provides the following documents of the project director

Points

(a) letter of commitment, (b) resume, (c) copy of original transcript? (2 points max.)

Resumes, position description & qualification standards for all key staff members who will be involved in operating the NABEC. There is no requirement for the Operator or other key staff to submit college transcripts or letter of commitment.

Rating Scale - points, if addressed:

Zero points if not addressed

Zero points if P.D. less than 100% time

0.5 pts if one of three items provided for P.D.

1.0 pts if two of three items provided for P.D.

1.5 pts if three of three items provided for P.D.

0.5 pts can be added if resume(s) for other key staff are provided

Panelist Comments:**ii. To what extent does the proposed staff (not contractors) have experience in working with SGI and/or rapid growth-potential clients? (2 point max.)**

Points

-

Rating Scale - points, if addressed:

Zero points if not addressed

0.5 pts at minimal level; 1.0 pts. at adequate level or better

1.5 pts at extended level; 2.0 pts at outstanding level

Panelist Comments:

Panelist Name:

Initials: _____

iii. To what extent does the proposed staff have experience in access to capital;
securing financial transactions for potential clients? (2 point max.)

Points

-

Rating Scale - points, if addressed:

0.5 pts at minimal level; 1.0 pts. at adequate level or better

Zero points if not addressed

1.5 pts at extended level; 2.0 pts at outstanding level

Panelist Comments:

iv. To what extent does the proposed staff have experience in access to markets;
securing procurement/contracting opportunities with private and/or
public entities for potential clients? (2 points max.)

Points

-

Rating Scale - points, if addressed:

0.5 pts at minimal level; 1.0 pts. at adequate level or better

Zero points if not addressed

1.5 pts at extended level; 2.0 pts at outstanding level

Panelist Comments:

v. To what extent do the qualifications, experience and proposed role of staff
posses the expertise in utilizing information systems? (1 point max.)

Points

-

Rating Scale - points, if addressed:

0.5 pts at minimal level; 1.0 pts. at adequate level or better

Zero points if not addressed

Panelist Comments:

Panelist Name:

Initials: _____

vi. To what extent does the applicant maximize total number consulting hours available for the NABEC in a program year? (1 points max.)

Points

-

Calculation = (total consulting hrs+marketing hours)/total staff hours

Note: total consulting hours = staff and outside consulting resources

Rating Scale - points, if addressed:

0.5 pts if % of total available consulting hours/yr = 60-69.9%

Zero points if not addressed

1.0 pts if % of total available consulting hours/yr = 70% or greater

Zero points if less than 60%

Panelist Comments:

End Section I

Panelist Name:
Initials: _____

-- UNOFFICIAL --**Native American Business Enterprise Center (NABEC)
Competitive Panel Evaluation Form****Section II. Resources****Maximum Points Allowable = 20****Total Points Awarded:****0.0****Percentage Awarded:****0%****Instructions**

For this criterion, the applicant must show how it plans to carry out the NABEC work requirements as related to resources.

A. Resources**Points Awarded****-****(Maximum 8 points)****Panel Definition:**

Assess those resources (not included as part of non-federal cost sharing) that will be used, including (but not limited to) existing prior and/or current data lists that will serve in fostering immediate success for the NABEC.

i. Does the applicant provide a list of established resource providers?**Points****-****For example: banks, financial institutions, bonding companies, business consultants, chambers of commerce, trade associations, state, local, and private technical assistance, providers that are available to assist minority companies? (2 points max.)**

Rating Scale - points, if addressed:

Zero points if not addressed

0.5 pts at minimal level; 1.0 pts. at adequate level or better

1.5 pts at extended level; 2.0 pts at outstanding level

Panelist Comments:**ii. Does the applicant demonstrate the ability to conduct ongoing analysis of procurement and financial databases? (2 points max.)****Points****-**

Rating Scale - points, if addressed:

Zero points if not addressed

0.5 pts at minimal level; 1.0 pts. at adequate level or better

1.5 pts at extended level; 2.0 pts at outstanding level

Panelist Comments:

Panelist Name:

Initials: _____

iii. Does the applicant discuss what resources will be utilized to accomplish the work requirements (not included as part of the cost-sharing arrangement)? (2 points max)

Points

-

Rating Scale - points, if addressed:

0.5 pts at minimal level; 1.0 pts. at adequate level or better

Zero points if not addressed

1.5 pts at extended level; 2.0 pts at outstanding level

Panelist Comments:

iv. Does the applicant discuss how it plans to establish and maintain a network of resources? (2 points max.)

Points

-

Rating Scale - points, if addressed:

0.5 pts at minimal level; 1.0 pts. at adequate level or better

Zero points if not addressed

1.5 pts at extended level; 2.0 pts at outstanding level

Panelist Comments:

B. Location (Maximum 2 points)

Points Awarded

-

Panel Definition:

Assessment of the Applicant's strategic rationale for the proposed physical location of the MBEC. Applicant is encouraged to establish a location for the MBEC. It is encouraged to establish location in a building which is separate and apart from any of its existing offices in the geographic service area.

i. Does the applicant provide proof that MBEC will be located separate and apart from existing operator offices? (2 points max.)

Points

-

Rating Scale - points, if addressed:

2 pts. if proposed

Zero points if not addressed

Zero points if proposed office allocated less than 51% of budget and resources.

Panelist Comments:

Panelist Name:

Initials: _____

C. Partners
(Maximum 5 points)**Points Awarded**

-

Panel Definition:

Applicant must indicate how it intends to establish and maintain the network of Strategic Partners and how these partners will support the NABEC to meet its performance objectives.

- i. To what extent does the applicant demonstrate how it will establish and maintain the network of 5 (min) strategic partners throughout the program year? (2 points max.)

Points

-

Rating Scale - points, if addressed:

Zero points if not addressed

0.5 pts at minimal level; 1.0 pts. at adequate level or better

1.5 pts at extended level; 2.0 pts at outstanding level

Panelist Comments:

- ii. To what extent will the proposed 5 Strategic Partners support the NABEC to meet its performance (goals, budget) objectives? (3 points max.)

Points

-

Rating Scale - points, if addressed:

Zero points if not addressed

0.5 pts at minimal level; 1.5 pts. at adequate level or better

2.0 pts at extended level; 3.0 pts at outstanding level

Panelist Comments:Panelist Name:
Initials: _____

D. Equipment
(Maximum 5 points)**Points Awarded****-****Panel Definition**

Assess how the applicant intends to accomplish the computer, hardware and software requirements. Note, it is permissible for the applicant to propose computers that are older than 2 but less than 4 years. In order to waive computer age limitation, applicant must provide documentation to support internal hardware meets computer requirements as outlined in the FFO. Please refer to program manager for assistance.

i. To what extent has the applicant met the computer requirements with respect to hardware and age of computers? (1 point max)

Points

-

Rating Scale - points, if addressed: 0.5 pt at minimal level; 1.0 pts. at adequate level
Zero points if not addressed

Panelist Comments:**ii. Does the applicant provide (a) network map, (b) agreement to adhere to MBDA security requirements? (3 points max.)**

Points

-

Rating Scale - points, if addressed: 1.5 pts. for item (a) network map
Zero points if not addressed per item 1.5 pts. for item (b) agreement to security requirements
Please provide sum of two in box

Panelist Comments:**iii. To what extent has the applicant proposal demonstrate adherence to meeting website, URL and Internet information requirements? (1 point max.)**

Points

-

Rating Scale - points, if addressed: 0.5 pt at minimal level; 1.0 pts. at adequate level
Zero points if not addressed

Panelist Comments:

Panelist Name:
Initials: _____

End Section II

S

-- UNOFFICIAL --**Native American Business Enterprise Center (NABEC)
Competitive Panel Evaluation Form****Section III. Techniques and Methodologies****Maximum Points Allowable = 20****Total Points Awarded:****-****Percentage Awarded:****0%****Instructions**

For this criterion, the applicant must show how it plans to carry out the NABEC work requirements.

It is important that the applicant adhere as much as possible to MBDA's programmatic requirements that are defined in the FFO.

**A. Performance Measures
(Maximum 10 Points)****Points Awarded:****-****Panel Definition:**

Assess the proposal for each program year, the manner in which the applicant relates each performance measure to the financial information and market resources available in the geographic service area (including existing client list); how the applicant will create NABEC brand recognition (marketing plan); and how the applicant will satisfy program performance goals. In particular, emphasis may be placed on the manner in which the applicant matches NABEC performance goals with client service hours and how it accounts for existing market conditions in its strategy to achieve such goals.

**i. To what extent does the applicant propose to meet and or exceed the
minimum performance levels? (2 points max.)**

Points

-

Rating Scale - pts if addressed:

0.5 pts at minimal level; 1.0 pts. at adequate level or better

Zero points if not addressed

1.5 pts at extended level; 2.0 pts at outstanding level

Panelist Comments:**ii. To what extent does the applicant's proposal demonstrate its ability
and capacity for understanding its existing market conditions and how
it plans to use this knowledge in achieving its goals? (2 points max.)**

Rating Scale - points, if addressed:

0.5 pts at minimal level; 1.0 pts. at adequate level or better

Zero points if not addressed

1.5 pts at extended level; 2.0 pts at outstanding level

Panelist Comments:

Panelist Name:

Initials: _____

iii. To what extent does the applicant's proposal reflect a system that corresponds to or may compliment MBDA's tracking and validating contracts and financings? (2 point max.)

-

Rating Scale - points, if addressed: 0.5 pts at minimal level; 1.0 pts. at adequate level or better
Zero points if not addressed 1.5 pts at extended level; 2.0 pts at outstanding level

Panelist Comments:

iv. To what extent does the applicant relate each performance measure to the financial, information and market resources available in the defined geographic service area? (2 points max.)

-

Rating Scale - points, if addressed: 0.5 pts at minimal level; 1.0 pts. at adequate level or better
Zero points if not addressed 1.5 pts at extended level; 2.0 pts at outstanding level

Panelist Comments:

v. To what extent does the applicant's performance outcomes match the proposed quarterly performance breakdown and estimated client service hours delivered to clients by NABE/MBE annual sales range. These hours must correspond to the applicant's proposed budget. (2 points max.)

-

Rating Scale - points, if addressed: 0.5 pts at minimal level; 1.0 pts. at adequate level or better
Zero points if not addressed 1.5 pts at extended level; 2.0 pts at outstanding level

Panelist Comments:

B. Start-up Phase
(Maximum 3 Points)

Points Awarded:

-

Panelist Name:
Initials: _____

Panel Definition:

Assess the proposal as to how the applicant will commence NABEC operations within the initial 30 day period. The NABEC shall have thirty (30) days to become fully operational after an award is made. (see FFO Appendix A, Work and Training Requirements). Fully operational means that all staff is hired, signs are up, furniture and equipment are in place and operational, all necessary forms are developed (e.g., client engagement letters, other standard correspondence etc.) and the Center is ready to open its doors to the public.

- i. Program Operators have 30 days to become fully operational after an award is made, does the applicant give assurance that this will happen. Fully operational means that all staff is hired, all signs are up, all items of furniture and equipment are in place and operational, all stationery forms are developed and the Center is ready to open its doors to the public. To what extent has the applicant assured the execution of the stated items? (2 points max.)**

-

Rating Scale - points, if addressed: 0.5 pts at minimal level; 1.0 pts. at adequate level or better
Zero points if not addressed 1.5 pts at extended level; 2.0 pts at outstanding level

Panelist Comments:

- ii. To what extent does the applicant include a description in its proposal showing how they intend to establish a detailed organizational & functional framework for the management and operation of the NABEC should include but not limited to; how the Center will recruit staff and clients as well as leverage its current roster of MBEs?) (1 point max.)**

-

Rating Scale - points, if addressed: 0.5 pt at minimal level; 1.0 pts. at adequate level
Zero points if not addressed

Panelist Comments:

**C. Work Requirements Execution Plan.
(Maximum 7 Points)**

Points Awarded:

-

Panel Definition:

Panelist Name:
Initials: _____

Assess the proposal as it relates to how effectively and efficiently all staff time will be used to achieve the work requirements, particularly with respect to periods beyond the start-up phase.

i) To what extent does the applicant include a description for how it intends to deliver services in the defined geographic service area and the methodology for accomplishing the Work Requirements? (2 points max.)

-

Rating Scale - points, if addressed: 0.5 pts at minimal level; 1.0 pts. at adequate level or better
Zero points if not addressed 1.5 pts at extended level; 2.0 pts at outstanding level

Panelist Comments:

ii) To what extent does the applicant include a detailed work plan, which delineates a schedule of proposed activities and milestones for implementing tasks under the award? (3 points max.)

-

Rating Scale - points, if addressed: 0.5 pt at minimal level; 1.0 pts. at adequate level
Zero points if not addressed 2.0 pts at extended level; 3.0 pts at outstanding level

Panelist Comments:

iii) To what extent does the applicant indicate how it will utilize staff to execute the work plan? Was a staff allocation summary provided? (2 points max.)

-

Rating Scale - points, if addressed: 0.5 pts at minimal level; 1.0 pts. at adequate level or better
Zero points if not addressed 1.5 pts at extended level; 2.0 pts at outstanding level

Panelist Comments:

End Section III

Panelist Name:
Initials: _____

-- UNOFFICIAL --**Native American Business Enterprise Center (NABEC)
Competitive Panel Evaluation Form****Section IV. Proposed Budget and Costs****Maximum Points Allowable = 20****Total Points Awarded:****-****Percentage Awarded:****0%****Instructions**

For this criterion, applicants must submit separate budgets and narratives for each of the three funding periods. Costs to the organization are expenses that it will incur in order for it to operate effectively. This section must contain a budget narrative. The budget narrative must provide information on how the money is going to be used and why. The proposed budget must be appropriate to the work requirements of the NABEC and the applicant's proposal overall. The budget narrative must provide sufficient information to justify line item expenditures in the SF-424A and the relationship to the program narrative.

The cost criterion is comprised of two parts:

- (a) Analyses of the reasonableness, allowability and allocability of costs.
- (b) Analysis of the applicant's proposed cost share.

1. Reasonableness, Allowability and Allocability of Costs.
(Maximum 5 points)

Points Awarded:**-****Panel Definition:**

Information is located in the Form SF-424A section and the "Proposed Budget/Costs" section of the program narrative. All of the proposed program costs expenditures should be discussed and the budget line item narrative must match the proposed budget. Fringe benefits and other percentage item calculations should match the the proposed budget line-item narrative.

- i. To what extent does the proposal provide an adequate descriptive narrative for each line item (by object class category) of the Federal and Non-Federal Costs in the proposed budget which justifies and sufficiently breaks down each proposed cost ? Did the applicant include detailed costs for staff participation, travel, and expenditures for the activities identified in the Announcement? (3 points max.)**

Points

-

Rating Scale - points, if addressed:

Zero points if not addressed

0.5 pts at minimal level; 1.0 pts. at adequate level

2.0 pts. at extended level; 3.0 pts. at outstanding level

Panelist Comments:

- ii. Are the costs reasonable, allowable under the cost principals, and allocable to an MBEC Award? (1 point max.)**

Points

-

Rating Scale - points, if addressed:

Zero points if not addressed

0.5 pts at minimal level; 1.0 pts. at adequate level or better

Panelist Comments:

Panelist Name:

Initials: _____

iii. To what extent are direct costs allocated to key consulting staff? (1 point max.)

Points

-

This is best evaluated as a percentage of total direct costs.

Calculate: sum of salary + fringe benefits divided by overall budget.

Rating Scale - points, if addressed: 0 pts if less than 40%
 Zero points if not addressed 0.5 pts if 40-59.9%
 1.0 pt if 60% or better

Panelist Comments:

2. Proposed Cost Sharing - Non Federal Cost Share
(Maximum 5 points)

Points Awarded:

-

Panel Definition:

Information is located in the Form SF-424A section and the "Proposed Budget/Costs" section of the program narrative.

i. Applicant must propose at least a 10% non-Federal cost share amount of the total project cost. To what extent does the applicant's proposal meet the 10% non-federal cost share? (3 points max.)

Points

-

Rating Scale - points, if addressed: 3.0 points if 20% or more is proposed
 Zero points if not addressed
 Zero points if 10% cost share not met.

Panelist Comments:

ii. Are commitment letters or other proper documentation from the non-federal cost share provider(s) attesting to the amounts included in the proposal? Reminder an original document is required for each. Failure to provide shall require an adjustment to the budget/proposal. (2 points max.)

Points

-

Panelist Name:

Initials: _____

Rating Scale - points, if addressed:
Zero points if not addressed

2 pts if all commitment letters included
1.5 pts if 66-99% of all commitment letters included
1 pt if 50-65% of all commitment letters included
0.5 pts if 33-49% of all commitment letters included
0 pts if less than 33% of commitment letters included

Panelist Comments:

3. Performance Based Budget (Maximum 10 points)

Points Awarded:

-

Assess to what extent does the line-item budget and budget narrative relate to the accomplishment of the NABEC work requirements and performance measures.

i) Does the applicant discuss how the budget is related to the accomplishment of the work requirements and the Performance measures? (5 points max)

Points

-

Rating Scale - points, if addressed:

Zero points if not addressed

1.0 pts at minimal level; 3.0 pts. at adequate level
4 pts at extended level; 5.0 pts. at outstanding level

Panelist Comments:

ii) Does the applicant provide a budget narrative that clearly links accomplishments of the work requirements to its Performance measures? If so, to what extent? (5 points max)

Points

-

Rating Scale - points, if addressed:

Zero points if not addressed

1.0 pts at minimal level; 3.0 pts. at adequate level
4 pts at extended level; 5.0 pts. at outstanding level

Panelist Comments:

Panelist Name:

Initials: _____

End Section IV

-- UNOFFICIAL --**Native American Business Enterprise Center (NABEC)
Competitive Panel Evaluation Form****Section V - Non-Federal Cost Share Bonus****Maximum Points Allowable = 5****Total Points Awarded:****-*****Panel Definition:***

Proposals with cost sharing for year 1, 2 and 3 which exceeds 10% that is allocated to the NABEC will be awarded bonus points on the following scale:

- more than 10% but less than 15% = 1 point
- 15% or more, but less than 20% = 2 points
- 20% or more, but less than 25% = 3 points
- 25% or more, but less than 30% = 4 points
- 30% or more = 5 points

Information is located in the Form SF-424A section and the "Proposed Budget/Costs" section

1. Non-Federal Cost Share Bonus Points (Maximum of 5 Points)**Points Awarded:****-**

What percent over the required 10% non Federal Cost Share did the applicant propose for all program years?

Panelist Comments:

Panelist Name:

Initials: _____

-- UNOFFICIAL --**Native American Business Enterprise Center (NABEC)
Competitive Panel Evaluation Form****Section VI. Oral Presentation****Oral Presentations are optional and only at the request of MBDA**

Maximum Points Allowable = 10

Total Points Awarded:

-

Percentage Awarded:

0%

Instructions

Oral presentations are optional and held only when requested by MBDA. When the MBDA merit review by the panel results in applications scoring 70% or more of the available points for each criterion, MBDA may request those applicants to develop and provide an oral presentation. This presentation will be used to establish a final evaluation & rating. If an oral presentation is requested, the applicant will receive a formal communication (via standard mail, e-mail or fax) from MBDA indicating the time and date for the presentation. In person presentations are not mandatory, but are encouraged; telephonic presentation are acceptable. Applicants will be asked to submit a PowerPoint presentations (or equivalent) to MBDA that addresses the oral presentation criteria set forth below. The presentation must be submitted at least 24 hours before the scheduled date and time of the presentation. The presentation will be made to the MBDA National Director (or his/her designee) and up to **Three senior MBDA staff who DID NOT SERVE ON THE MERIT EVALUATION PANEL**. The oral panel members may ask follow-up questions after the presentation. MBDA will provide the teleconference dial-in number and pass code. Each finalist will present to MBDA staff only; competitors are not permitted.

The applicant's oral presentation will be evaluated as to the extent to which the presentation demonstrates the following:

- a) **To what extent does the applicant demonstrate how they will effectively and efficiently assist MBDA in the accomplishment of its mission? (2 points max.)**

Points

-

Rating scale - points, if address:

0.5 pts at minimal level; 1.0 pts. at adequate level

Zero points if not addressed

1.5 pts. at extended level; 2:00 pts. at outstanding level

Panelist Comments:

- b) **How did the applicant demonstrate its business operating priorities designed to manage a successful NABEC? (2 points max.)**

Points

-

Rating Scale - points, if addressed:

0.5 pts at minimal level; 1.0 pts. at adequate level

Zero points if not addressed

1.5 pts. at extended level; 2.0 pts. at outstanding level

Panelist Comments:

- c) **To what extent did the applicant describe its management philosophy that will achieve an effective balance between micromanagement and complete autonomy for its Project Director? (2 points max.)**

Points

-

Rating Scale - points, if addressed:

0.5 pts at minimal level; 1.0 pts. at adequate level or better

Zero points if not addressed

1.5 pts. at extended level; 2.0 pts. at outstanding level

Panelist Comments:

Panelist name:
Initials:

d) To what extent did the applicant outline its robust search criteria for the identification for its Project Director?
Director? (1 point max.)

Rating Scale - points, if addressed: 0.5 pts at minimal level; 1.0 pts. at adequate level or better
Zero points if not addressed

Points

Panelist Comments:

e) To what extent did the applicant discuss and explain its effective employment recruitment and retention policies and procedures? (1 point max.)

Rating Scale - points, if addressed: 0.5 pts at minimal level; 1.0 pts. at adequate level or better
Zero points if not addressed

Points

Panelist Comments:

f) To what extent did the applicant demonstrate a competitive and innovative approach to exceeding performance requirements? (2 points max.)

Rating Scale - points, if addressed: 0.5 pts at minimal level; 1.0 pts. at adequate level or better
1.5 pts. at extended level; 2.0 pts. at outstanding level
Zero points if not addressed

Points

Panelist Comments:

End Section VI - Oral Presentation